ePlan

User Guide

10-20-2026

Santa Cruz County

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Part 1: ePlan Overview

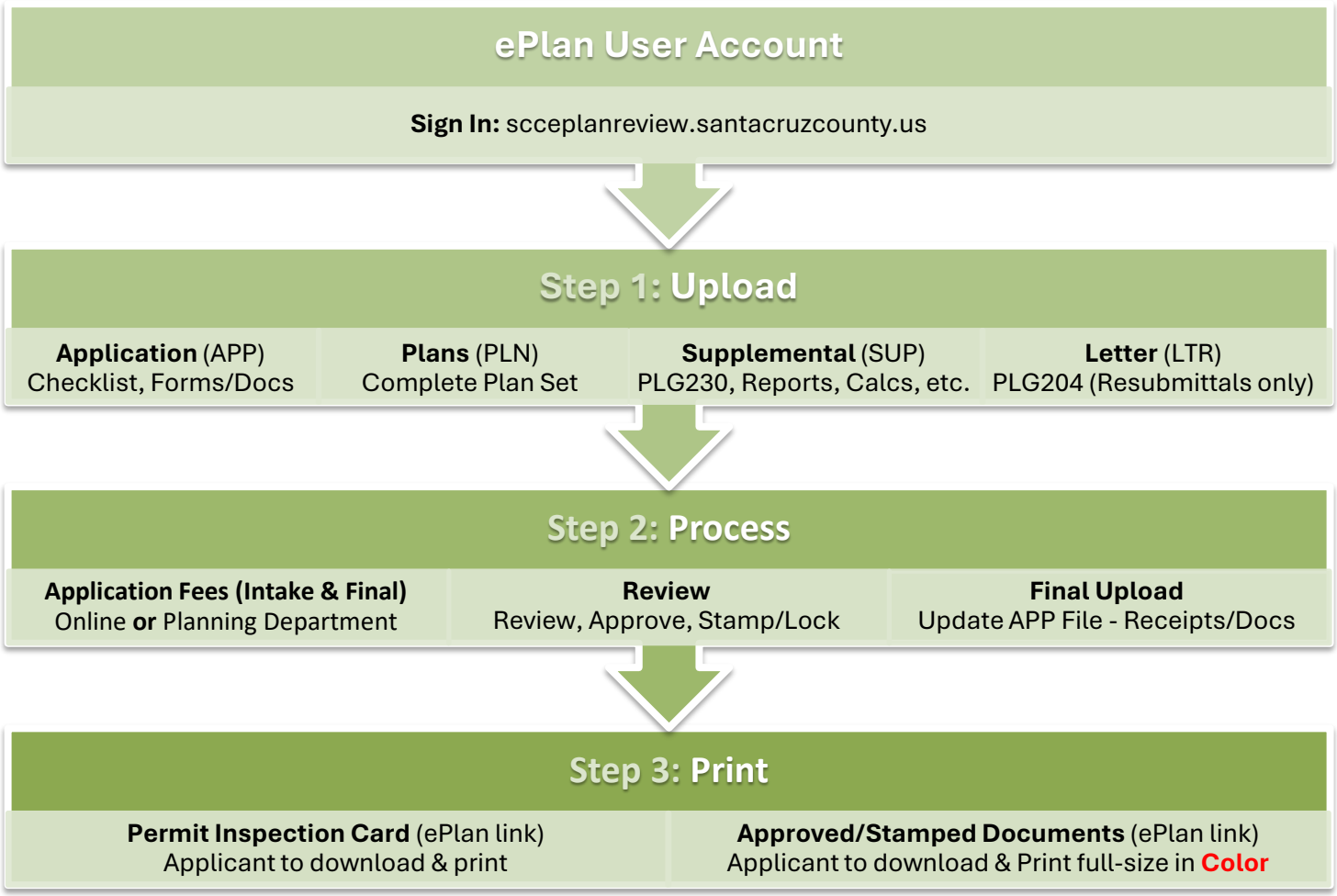
SCC ePlan Review facilitates the complete processing of Building and Discretionary permits online utilizing pdf files.

Your *ePlan User Account* is used for managing projects, uploading submittals, tracking status, and downloading stamped/issued documents and permit inspection cards. Prints of issued documents and permit inspection cards must be at the project site.

The process is outlined *here* and technical aspects are explained in this guide. For additional help and submittal requirements, please see *Planning Department*, *SCC ePlan*, and *ePlan Video Series Channel*.

***ePlan Video Series Channel**: Visit our YouTube channel for step-by-step video tutorials on submitting new projects, resubmittals, and final applications, as well as formatting bookmarks and zoom settings in Adobe Acrobat Pro.*

***ePlan Video Channel URL:** https://www.youtube.com/channel/UCvcSlgqggUFXtPLy4-xrOvA*

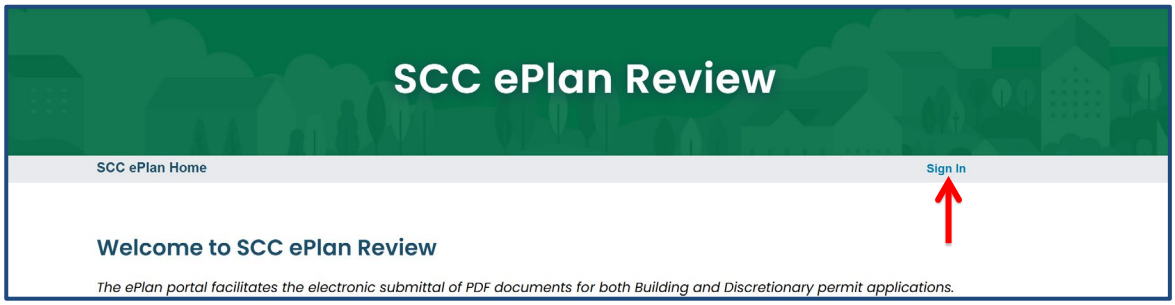


Part 2: ePlan Accounts & Information

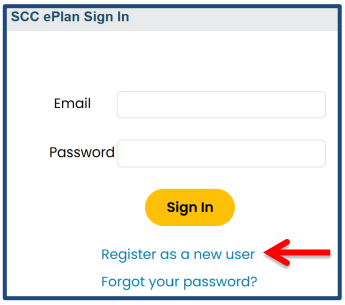
Accounts are registered to one email address and is password protected; however, accounts can be used simultaneously by multiple people. Each person who Signs In has complete control of the account and projects. Confirmations and notices are sent to the registered email.

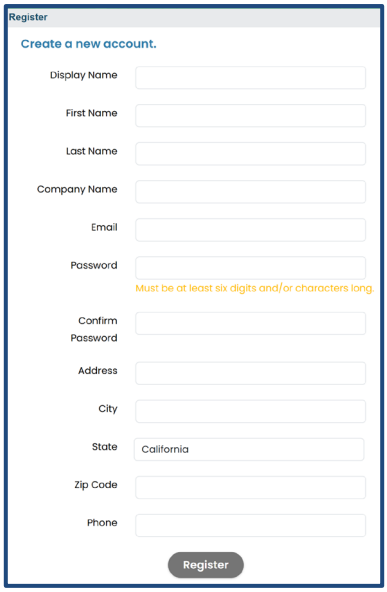
Account Registration & Editing

To register a new user account, click *Sign In* on *SCC ePlan Review Home* page.



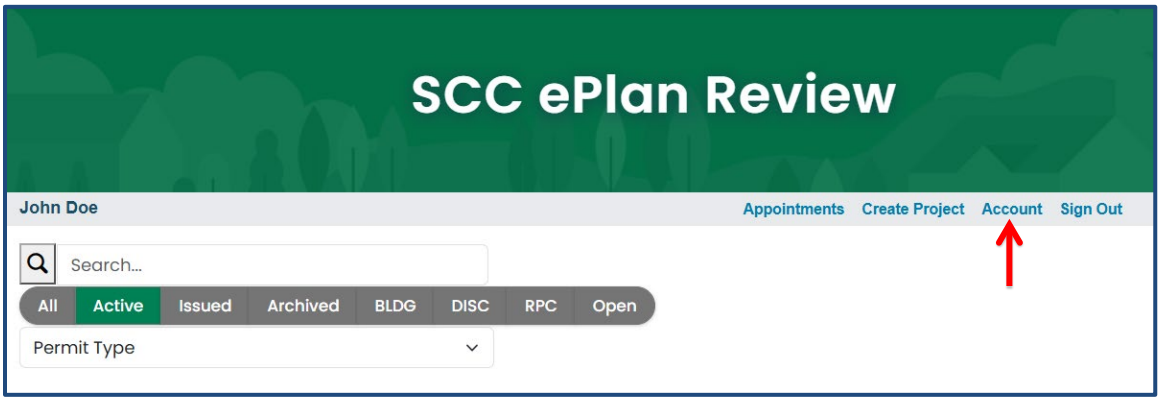
Click *Register as a new user* and enter account information.







To edit an existing account, Sign In and click *Account*.



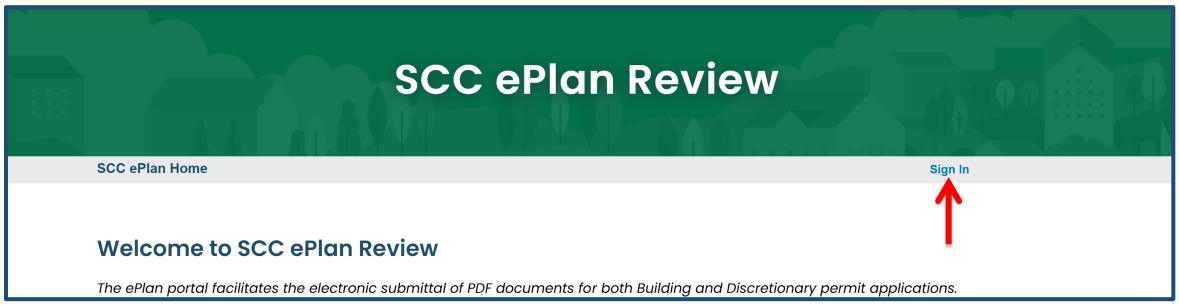
Transfer: Account & Project(s)

Accounts and projects can be transferred to a different account by County staff. Provide a transfer request on company letterhead in pdf format to the Permit Technicians that clearly identifies both accounts, and whether to transfer the account, or specific projects of an account (fees apply). If necessary, create an account prior to the transfer request.

Account transfers will include all projects/data, and the original account is automatically deleted.

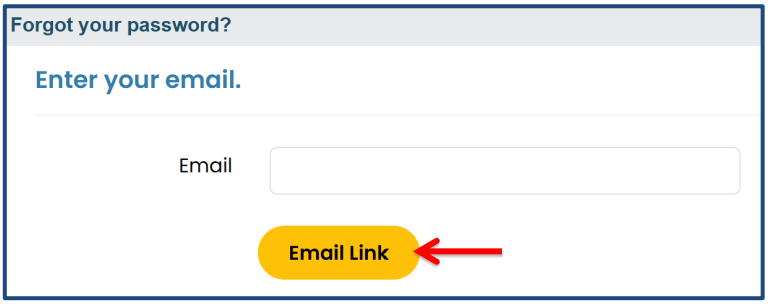
Forgot Your Password?

Click *Sign In* on *SCC ePlan Review Home* page.



Click *Forgot your Password?* and enter the account email. An email will be sent with the link to open the *Reset Password* page. A message to check your email will display whether you entered the email correctly or incorrectly.

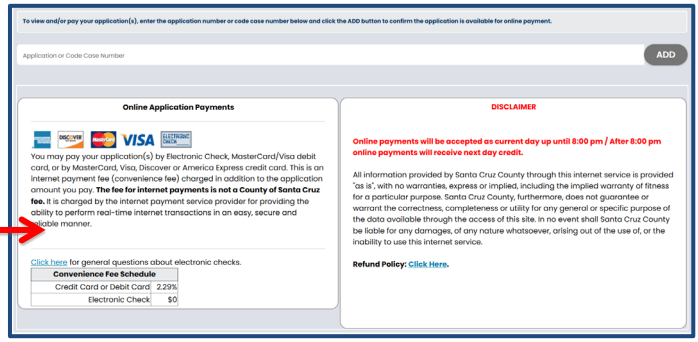




Fees & Payments

The *Fees & Payments* page explains fees and provides a link to *Pay Fees*.





Questions & Contacts

Building Information: 831-454-2260 or email Planning.BuildingInfo@santacruzcountyca.gov.

Part 3: ePlan Standards

Upload all required forms and submittal documents to the ePlan portal (emails, usb, etc. not allowed). Some ePlan standards may require use of pdf editors such as Adobe Acrobat Pro DC, Bluebeam Revu, or similar.

ePlan General Standards

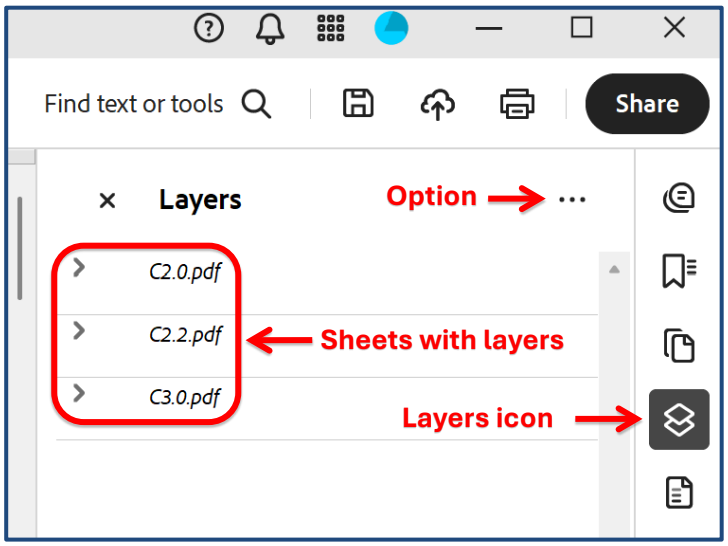
1. **ePlan Submittals:** The color "red" is reserved the County use and stamps. For general County submittal requirements, please the *CDI Website*.
2. **Unrestricted/Unlocked Files:** Submittals cannot be restricted/locked in any manner by digital signatures or otherwise. The County must have full control of files to accomplish #4 below.
3. **Professional Stamps & Signatures:** Stamps & signatures of California licensed Architects & Engineers must be embedded using images or other methods. Restrictions imposed by digital signatures are not allowed.
4. **County Stamp/Lock:** Approved documents are electronically stamped and locked with printing enabled. The stamp is 2.5 inches wide & 1.5 inches high; a stamp area in the title block will expedite processing.
5. **PDF Format:** PDFs must be converted from AutoCAD, Revit, ArchiCAD, etc. to retain the vector file format. However, clean scans of documents *produced by hand* are allowed.
6. **Flatten & Bookmark:** Files must be flattened to remove layers and bookmarked for navigation.

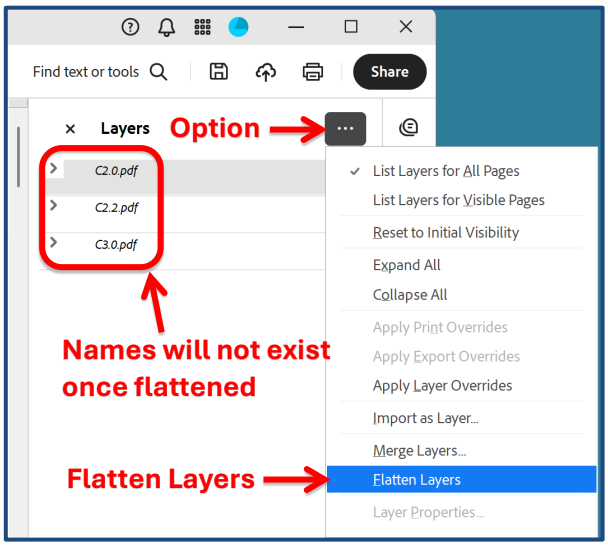
Flattening Layers (Adobe Acrobat DC Pro)

CAD programs or other software may include layers when saving to PDF. Verify if layers exist and flatten them.

Adobe states "when you flatten a PDF you combine all of the contents into just one single layer." Once flattened, the layers panel will be empty (no sheet/layer names). The visible content for each sheet is preserved, ensuring the proper display and printing of each sheet.

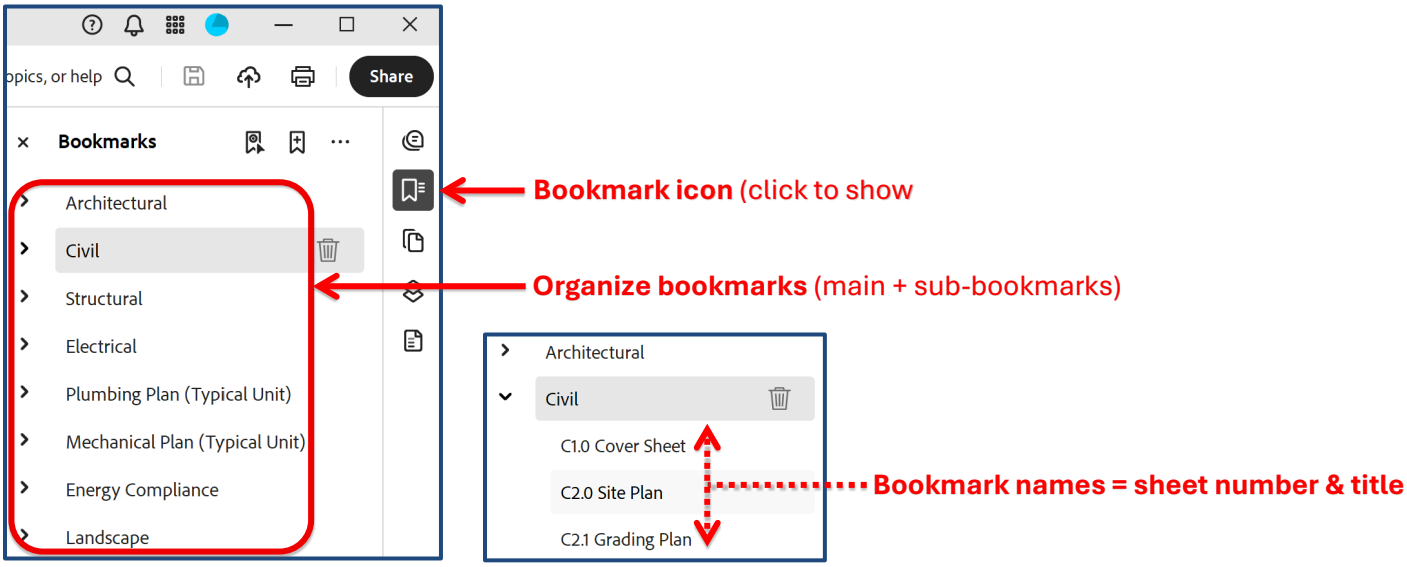
Click the *Layers* icon to show the Layers panel and choose *Flatten Layers* from the *Options* menu.





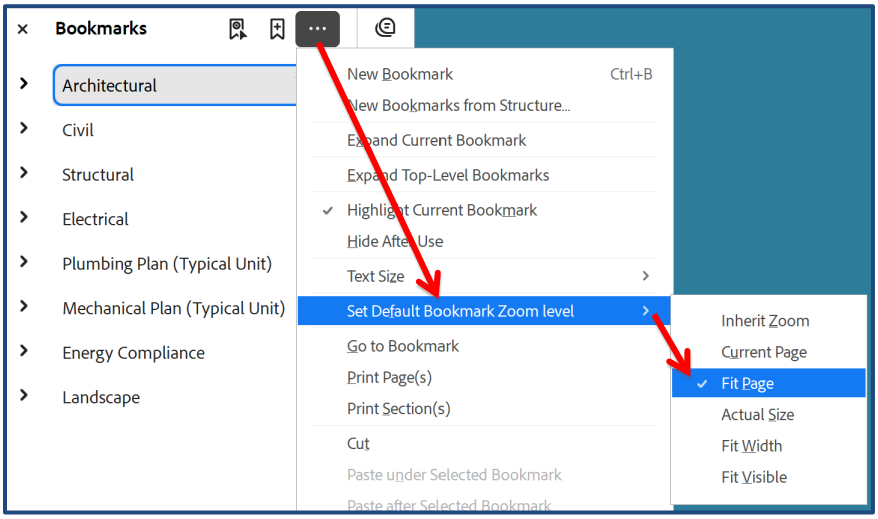
Bookmarking (Adobe Acrobat DC Pro)

Bookmarks are required to navigate documents. Bookmarks must be set to *Fit Page* and the names must match the **number & title** of each plan sheet, or each document and key section of the Supplemental document.

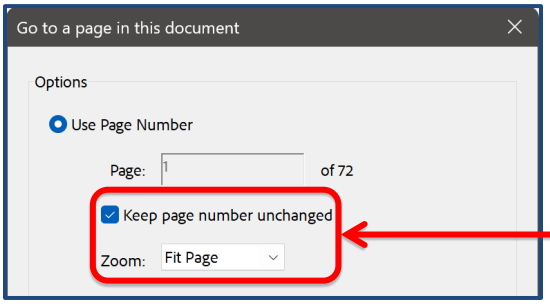


Tip: *SCC ePlan* video series shows various techniques of creating and editing bookmarks. Some are shown below.

Set Default Bookmark Zoom level is set to *Fit Page*. Once set, any bookmark you create will be *Fit Page*.



Change all bookmarks Zoom levels to *Fit Page* and retain the correct destination pages in one step!



Select all bookmarks, then [Options]>**Properties...>Actions>Edit,** and set **Zoom: Fit Page** (see graphic)

Part 4: ePlan Projects

Project – File Types

Every uploaded file must be bookmarked, layers flattened, and contain all sheets/documents required for issuance. The process is outlined *here* and *ePlan Video Series*.

Application (APP): ePlan Submittal Checklist – PLG230 (1st page), application form, and other applicable documents

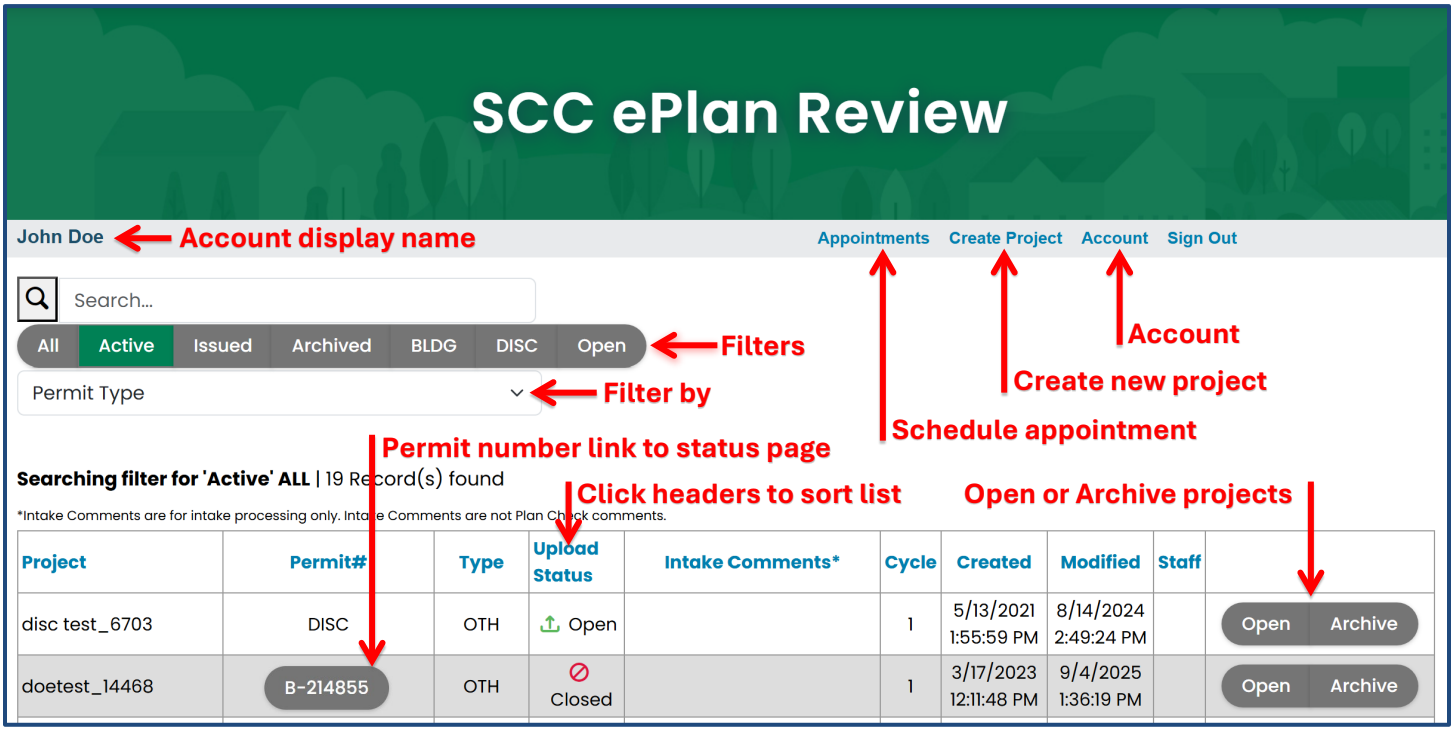
Plans (PLN): Plans: architectural, structural, electrical, energy, etc.

Supplemental (SUP): Supplemental Documents Index – PLG235 (1st page) and any applicable documents such as structural calculations, geotechnical reports, etc.

Letter (LTR): (resubmittals only) Building Resubmittal Response Form – PLG204 (1st page) and annotated correction comments (no other content)

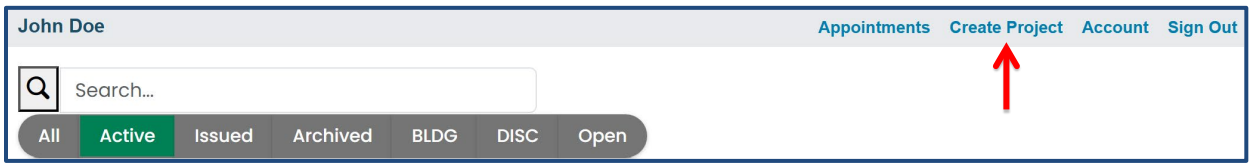
Project – User Home

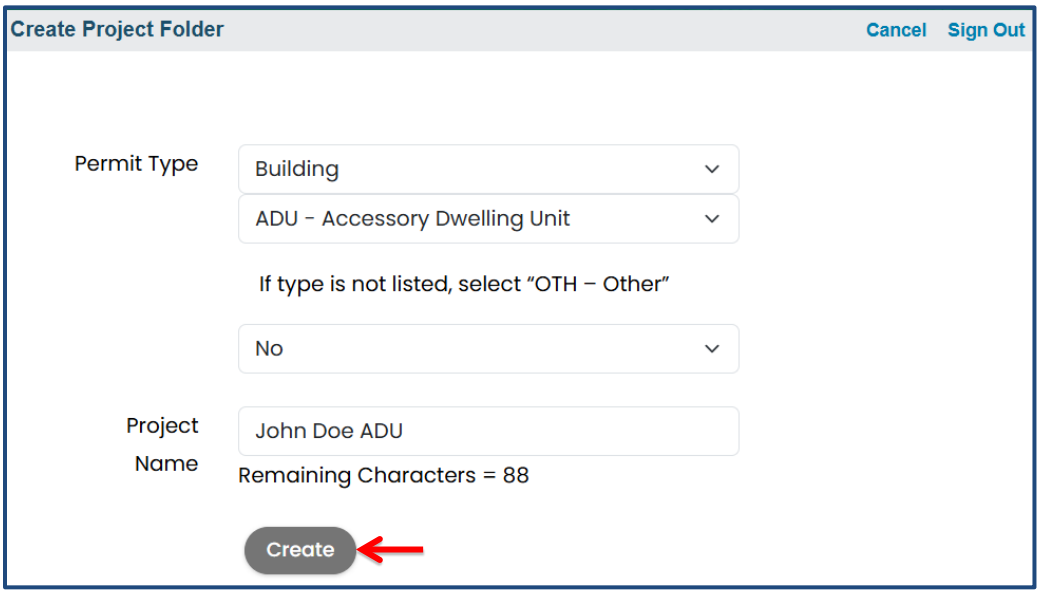
Sign In and the *User Home* page provides access to all account options. All projects are accessed and managed using filters and sorted by headers.



Project – Create Project

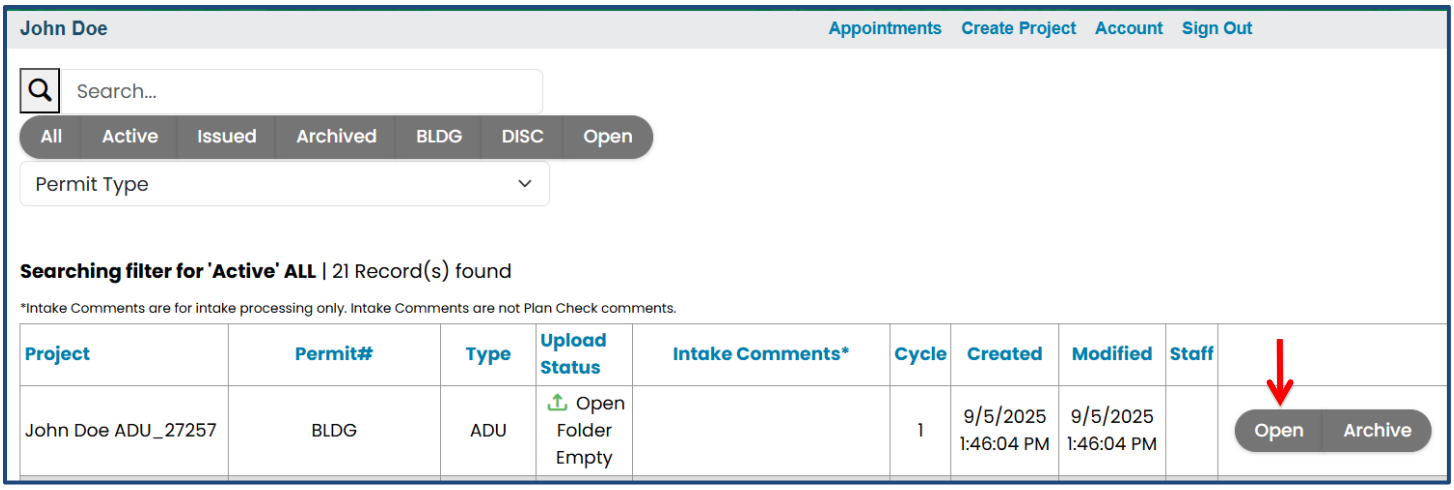
Once a project is created it is added to the User Home. Click *Create Project*, make permit type selections, provide name, and click *Create*.





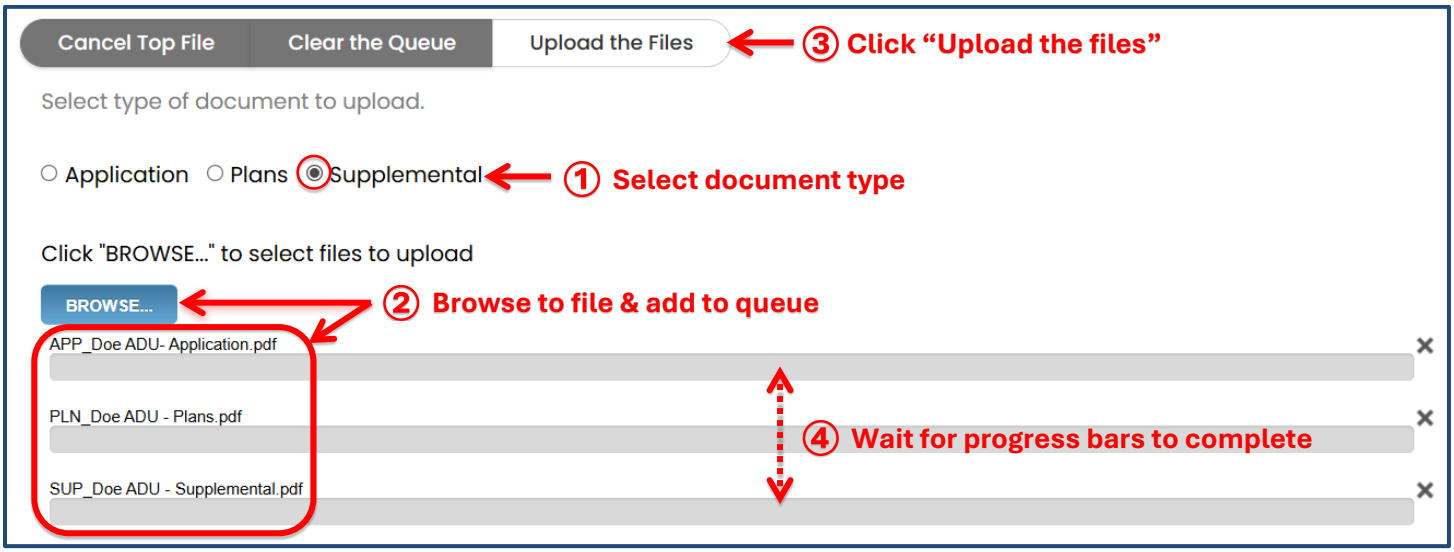
Project – File Uploads

To add files to a project, *Open* the project and click *Upload*.



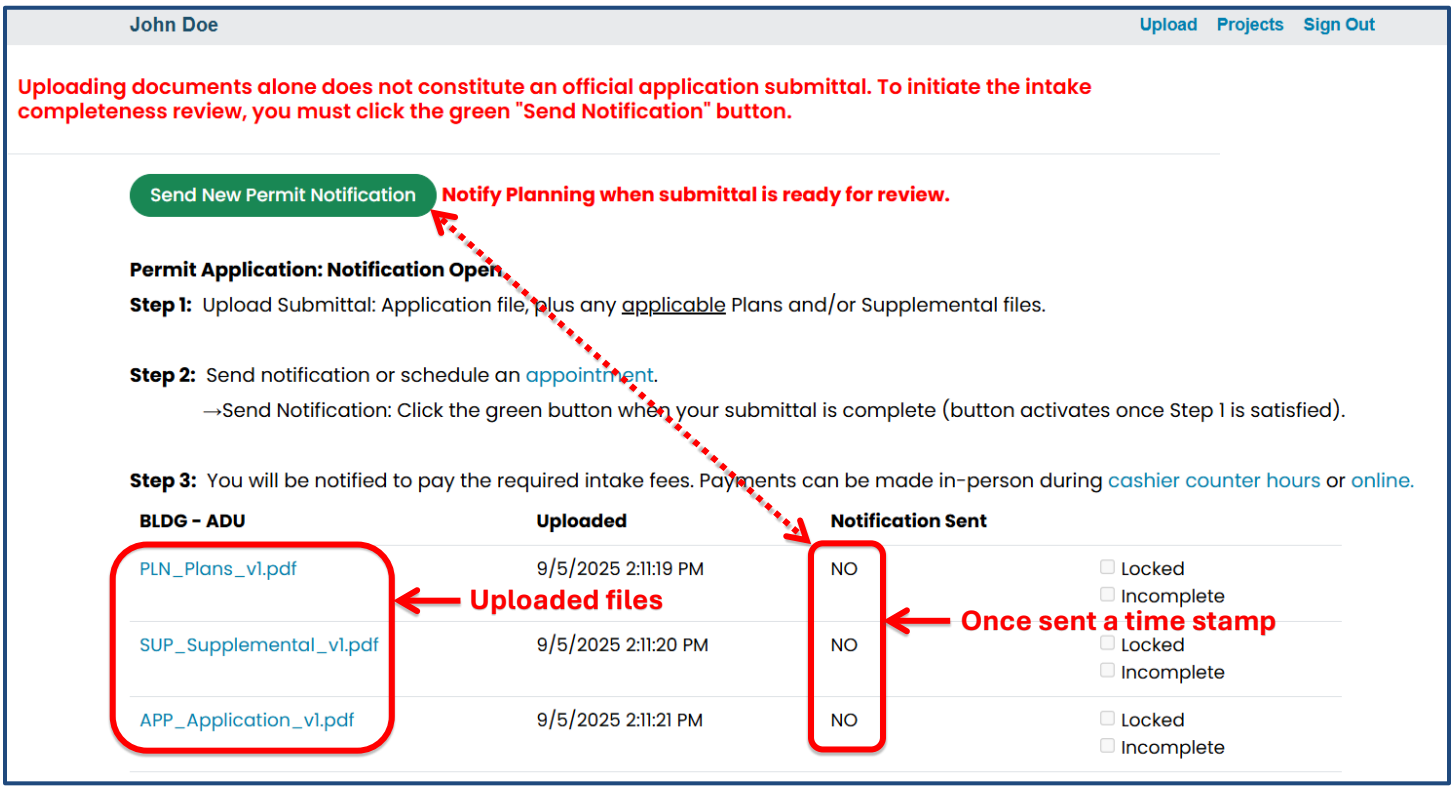


On the Upload page, select a file type and *Browse* to add it to the queue, once all files are in the queue, click *Upload the files*. Progress bars will show progress, and the project page will display once complete.



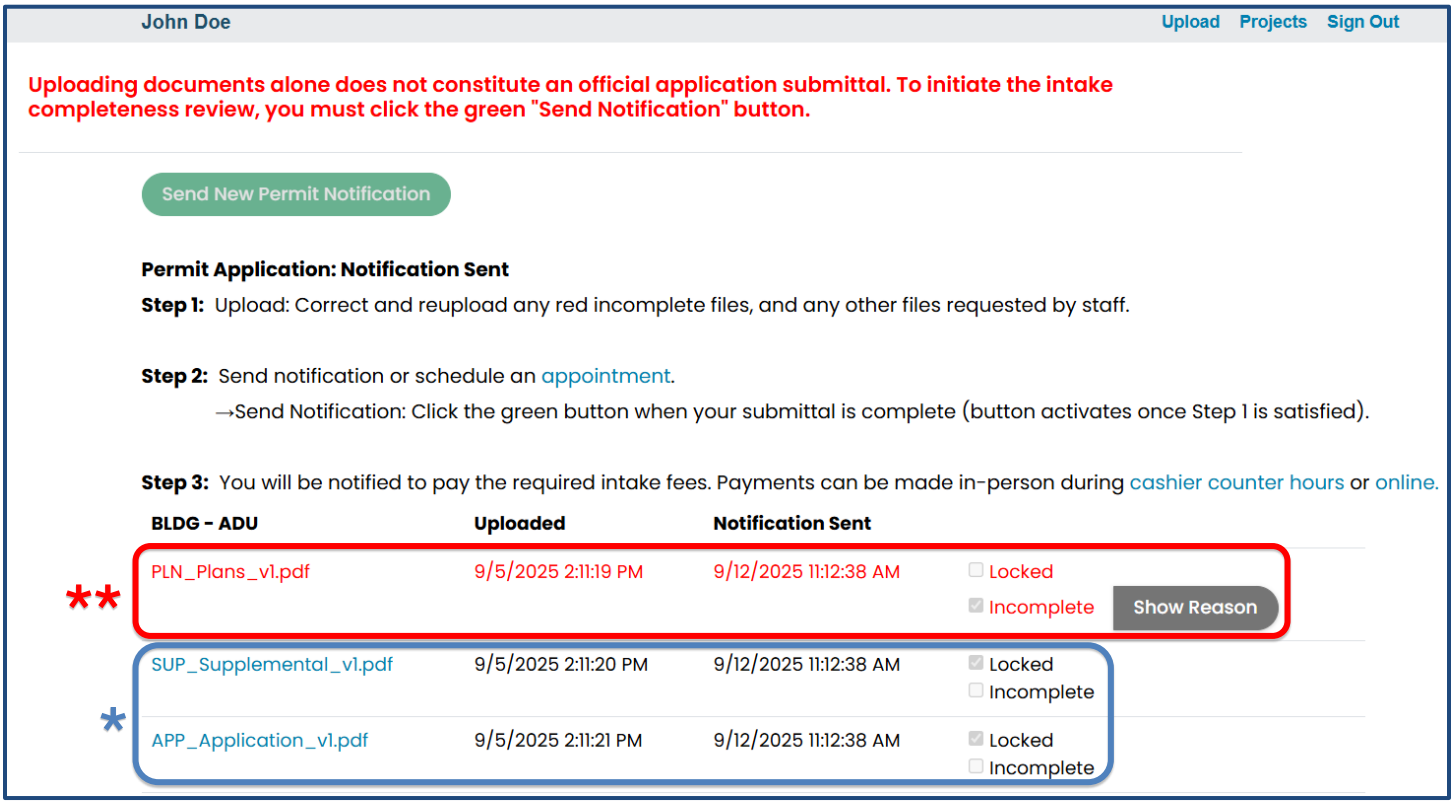
Note: New projects must include an Application (APP) file, plus at least one other file type (e.g. Plans (PLN) and/or Supplemental (SUP)); once that combination exists, the green button allows notifications to be sent.

To request an intake completeness review, click the green *Send New Permit Notification*.



*Uploads are color coded and renamed. Files are prepended by type (APP, PLN, SUP, LTR), and appended by review cycle (v1, v2, etc.). Once assigned a permit number, names will match the number (e.g. PLN_B-123456_v1). The *locked* blue (current cycle) & green (previous cycle) files were accepted for review.

**Red files are incomplete and must be replaced; click *Show Reason* for requirements. Files cannot be deleted; simply upload new files to replace them. Gray files are part of the upload history but are not part of a submittal.

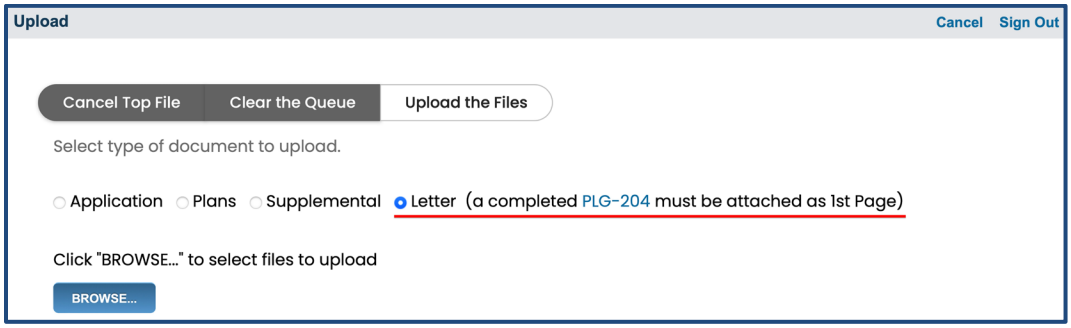


Project – Resubmittals

Once all agency reviews are complete, the Application Status changes to Resubmittal, the ePlan portal is unlocked to allow uploads, and a notification is sent to the email registered to the ePlan account.

Revisions must address corrections for all agencies and be identified with clouding & delta markers. Each time a file is uploaded, it must contain **all sheets/documents needed for issuance**, not just the new/revised portions. Do not upload files unless they contain revisions.

The Letter file (with PLG-204 as 1st page) must include an annotated copy of all correction comments and explain revision locations with sheet/drawing numbers. Do not include any other documents in this file.



Once all necessary files are uploaded, **you must notify CDI** by clicking the green notification button. Staff will assess the uploads and then email you that they were accepted for review or explain what is needed for acceptance.

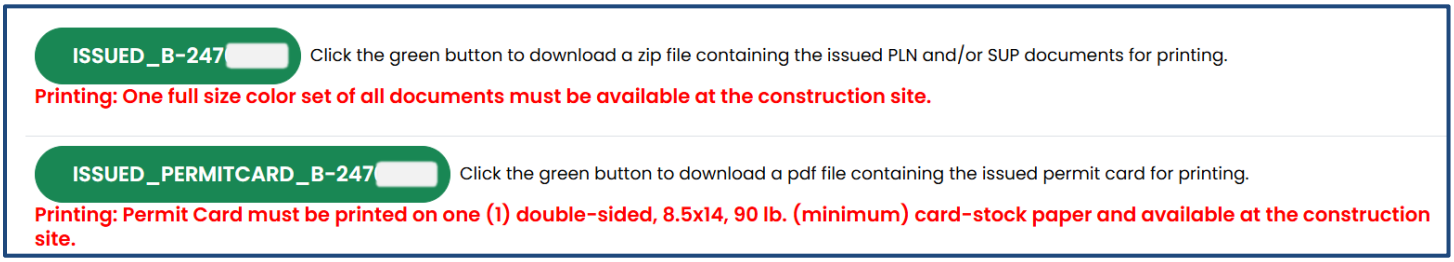


Note: *Text can be copied/pasted into text editing programs directly from the Application Status webpage. Simply drag your cursor over the text to select it and then copy/paste into Word or another program.*

Project – Approval

Approval notices are sent via the portal email and postal mail identifying any final fees and/or *Final Items* (e.g. receipts or forms) to be added to Application (APP) file and then uploaded to the portal. If final documents are required, the portal is set to only allow the final Application (APP) upload.

At permit issuance, downloads for the issued documents and permit inspection cards will appear in the *Project* folder. Downloads are zip files containing printable PDF documents that are stamped and locked. One full size set of these documents must be *printed in color* and available at the construction site. The applicant is responsible for coordination of printed documents.



Project – Changes (CCD) & Deferred (DEF)

These permit types amend the issued permit documentation. Only submit *the revised PLN sheets and/or SUP documents* for review (not the complete documents). If the PLN/SUP file was not revised, do not upload it.

1. Create a *new project* in the ePlan portal.
2. Upload the APP file with a submittal checklist (*PLG230)* and an application form (*PLG205* or *PLG206)*.
3. Cloud all revisions and mark with a delta symbol.

4. Upload a PLN (revised sheets only) and/or SUP (*PLG235* and revised documents only) *only if they contain revisions*. Maintain all unaffected content on the revised sheets.

    a. CCD: Construction Change Documents Include a description of changes on the cover sheet; coordinate documents (e.g. architectural, structural, electrical, etc.); update the sheet index, consultant list, etc. as applicable; and incorporate any clarification marks added to sheets during permit issuance.

    b. DEF: Deferred Submittals typically submit the deferred items only (e.g. PV system, truss package, product reports etc.) and any applicable engineer review letters or *PLG300* forms. See PLG206.

5. Staff will provide review agencies with the issued permit files for reference. Do not upload them.